

Park House  
158/160 Arthur Road  
London SW19 8AQ  
Solicitor

# McGlennons Solicitors

Andrew McGlennon BA Hons

Telephone 020 8946 6015

Fax 020 8946 8803

Website [www.mcglennons.co.uk](http://www.mcglennons.co.uk)

Email [mail@mcglennons.co.uk](mailto:mail@mcglennons.co.uk)

## Will Instructions

(Please write clearly)

### Personal Details

Your Full Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

E-mail: \_\_\_\_\_

Tel: (Home) \_\_\_\_\_

Occupation: \_\_\_\_\_

Have you made any previous Wills? Yes/No

Have you ever been married/entered a civil partnership? Yes/No

If so are you divorced/partnership dissolved? Yes/No/Not Applicable

Do you have any children? Yes/No

### Main Assets – Please give approximate values to the following: -

House/Flat (if owned): £

Money in Bank or Building Society: £

Shares: £

Life Insurance/Endowment Policies: £

Are any of the above held jointly with someone else? Yes/No

If yes, who? \_\_\_\_\_

Do you have any company or personal pension entitlement? Yes/No

If yes have you made a nomination for someone to take any benefit on your death before pensionable age? Yes/No

If yes, who? \_\_\_\_\_

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## Liabilities

Outstanding Mortgage: £

Other large debts e.g. H.P./Car Loans, etc.: £

## Executors

Who do you want as your Executor(s)?

Full Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Who will be your Executor if the above named has died before you?

Full Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

## Guardians for Children

If you have a child or children under 18 you can appoint a guardian for them to exercise whatever rights you have exercised as a parent. Please give details

below: -

Full Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

## Legacies/Gifts

Do you have any gifts of specific items or sums of money you want to go to any persons or organisations? If yes, complete the section below. If a beneficiary is under 18 please state their age.

Gift(1) – State item and name and address of who is to receive it.

Gift(2) – State item and name and address of who is to receive it.

(Continue gifts on separate sheet if necessary)

## Residue

After payment of your debts and funeral expenses who is to get the residue of your Estate? Please give full name(s) of the person(s) or organisation(s). If a beneficiary is under 18 please state their age.

Full Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

If the person(s) receiving the residue of your Estate has/have died before you, who is then to get the residue?

Full Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

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## Funeral Instructions

Do you wish to be buried or cremated?                      Burial/Cremation

Any other funeral instructions? Please give details.

## Claims against your Estate

To try to ensure that your estate is not open to any claims after your death, please answer the following questions: -

1. Do you have a spouse/civil partner who will not be named as a beneficiary? Yes/No
2. Are you married/in a civil partnership but separated (this would include a marriage/partnership of convenience)? Yes/No
3. Are you responsible for the upkeep or maintenance of any person who will not be named as a beneficiary? Maintaining someone can include providing someone with rent-free accommodation. Yes/No
4. Do you or your spouse/civil partner have a child or children who will not be named as beneficiaries but who, in whole or in part, are maintained by you? This includes foster or illegitimate children. Yes/No
5. Do you have any child, of whatever age, who is physically or mentally disabled? Yes/No
6. Do you intend to marry or enter into a civil partnership in the near future (i.e. within the next six months), as marriage/civil partnership usually revokes a will automatically? Yes/No

If you have answered 'Yes' to any of the above questions please give details below.

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**Special Circumstances**

None/As Follows: -

**Finally**, please add any relevant information you think useful or which has not been covered above: -

Your Signature \_\_\_\_\_ Date \_\_\_\_\_

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## Guide to Completing Will Instructions

The Will Instruction Form should be fairly easy to complete, but these notes may be of some help.

### **Previous Wills**

This information is important as any previous will needs to be revoked. If you have made a will previously then sending a photocopy to us would be helpful but is not necessary. Even if you have made no previous wills a revocation clause will be inserted in your will as a precaution.

### **Main Assets**

This information is needed to gauge the size of your estate. Your estate is everything you own at the date of your death. The figures do not have to be exact. In the event of a death in the tax year 2009/2010 you can leave up to £325,000 in your Estate before Inheritance Tax has to be paid at 40% on the excess above that.

### **Marriage/Children**

If you are married/in a civil partnership (or divorced/dissolved and still supporting your spouse/civil partner) and you have children, then information on them is important, especially if you are not leaving them anything. If you have children then you can appoint a Guardian to exercise your parental rights after your death.

### **Executors**

These are the people that administer your Estate after your death and see that the terms of your will are carried out. In over 9 out of 10 cases Executors employ solicitors to administer and wind up an estate for them. Anybody over the age of 18 can be an Executor but it makes sense to appoint a UK resident and someone not that much older than you. You can have any number between one and four Executors but in most cases one will do. You may wish to appoint a substitute to act if your chosen Executor dies before or at the same time as you.

*If you are spouses/civil partners or just long term partners leaving everything or nearly everything to each other it is sensible to appoint each other. McGlennons Solicitors can act as your executors if you wish.*

### **Gifts**

These are also called legacies or bequests and can be of anything in your Estate. However, please describe the object or the sum of money precisely. For instance, it is no good leaving someone your silver lurex ballgown if when you die you have five slightly differing silver lurex ballgowns. It will not be known which one you mean and a dispute can arise.

### **Residue**

There has to be a sweeping up clause to catch everything not otherwise given away in your will. Indeed you may not have made any gifts at all and your residuary estate may all be going to one person or a charity. You can leave your residue between several people either equally or on specified proportions. Again, as with Executors, if you are leaving all your residue to one person it is better to name a substitute to receive the residue if the first named person predeceases you.

### **Funeral Instructions**

These are not strictly necessary but your will is a convenient place to state your wishes - especially if there could be a dispute between a gay/lesbian partner and the deceased's family. You can simply say you wish to be buried or cremated or you can give more extensive instructions.

### **Claims Prevention**

To help try and prevent any claims against your estate it is important to know if you financially support or are morally obliged to anyone (such as spouses, civil partners, lovers and children) not provided for in the will.

### **Other Relevant Information**

The will form covers nearly everything a solicitor will need to know to prepare your will. However, if you have very special personal circumstances you think may be important please state them in the space provided.

### **And Finally**

If you have any difficulty please do not hesitate to telephone when help can be given. When you have completed the form please return it to the above address.

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## Terms and Conditions of Business

Thank you for your enquiry for us to act in the drawing up of your will. Everything possible will be done to see that the matter proceeds as smoothly and as quickly as it can if this firm is instructed.

If you wish this firm to act for you the professional body for Solicitors, the Law Society, states certain information has to be given to you and our terms of business set out clearly and unambiguously.

The following information is therefore given to you in accordance with Law Society Practice Rule 2 and their guidelines on the acceptance of new instructions.

The estimated charge on the drawing of your will(s) is: -

£135 plus VAT for a single will by e-mail

£180 plus VAT for a single will after attendance

£180 plus VAT for two wills, by e-mail, for partners, the wills being in broadly similar terms

£250 plus VAT for two wills, after attendance, for partners, the wills being in broadly similar terms

You will in fact be charged these figures in the vast majority of cases unless your will is very complex or lengthy in which case we will tell you what extra fee may be involved before proceeding. The fees represent the time spent on the matter plus an element for the responsibility, complexity and value of the transaction, the latter mainly being the risk it represents to the firm's professional indemnity insurance. The fees will be payable on or before signing the will.

If a will is drafted and sent but we hear nothing further from you then the right is reserved to charge for the work done or carried out on such abortive cases.

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It is not anticipated that any money will be spent on your behalf nor that any money will be held for you, but if we do it will be held via the firm's clients account, which is guaranteed entirely against default by the Law Society.

Andrew McGlennon, a solicitor, will have day to day conduct of this matter and if you have any complaints these should be raised directly with him and if he cannot resolve the problem then he can give you the address of the Law Society's Consumer Complaints Service. He is always here to explain things you do not understand or wish to have explained further.

As confirmation that you wish to proceed on this basis it would be helpful if you could sign the extra copy of this letter enclosed and return it to the address above. If further instructions are received from you then whether you sign these terms or not your further instructions will be taken to mean that you agree these terms of business.

Received, understood and agreed

\_\_\_\_\_

Dated \_\_\_\_\_